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APPLICATION NO.	FILING DATE	FIRST NAMED INVENTOR	ATTORNEY DOCKET NO.	CONFIRMATION NO.
10/602,287	06/24/2003	Romelia H. Flores	BOC9-2003-0013 (383)	1163
40987	7590	11/13/2007	EXAMINER	
AKERMAN SENTERFITT			ADDY, THJUAN KNOWLIN	
P. O. BOX 3188			ART UNIT	PAPER NUMBER
WEST PALM BEACH, FL 33402-3188			2614	
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			11/13/2007	PAPER

**Please find below and/or attached an Office communication concerning this application or proceeding.**

The time period for reply, if any, is set in the attached communication.

<b>Office Action Summary</b>	Application No. 10/602,287	Applicant(s) FLORES ET AL.	
	Examiner Thjuan K. Addy	Art Unit 2614	

**-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --**  
**Period for Reply**

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133). Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

#### Status

- 1) ☒ Responsive to communication(s) filed on 23 July 2007.
- 2a) ☒ This action is **FINAL**.                      2b) ☐ This action is non-final.
- 3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

#### Disposition of Claims

- 4) ☒ Claim(s) 1-30 is/are pending in the application.
- 4a) Of the above claim(s) \_\_\_\_\_ is/are withdrawn from consideration.
- 5) ☐ Claim(s) \_\_\_\_\_ is/are allowed.
- 6) ☒ Claim(s) 1-30 is/are rejected.
- 7) ☐ Claim(s) \_\_\_\_\_ is/are objected to.
- 8) ☐ Claim(s) \_\_\_\_\_ are subject to restriction and/or election requirement.

#### Application Papers

- 9) ☐ The specification is objected to by the Examiner.
- 10) ☒ The drawing(s) filed on 24 June 2003 is/are: a) ☒ accepted or b) ☐ objected to by the Examiner.  
Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).  
Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).
- 11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

#### Priority under 35 U.S.C. § 119

- 12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).
- a) ☐ All    b) ☐ Some \*    c) ☐ None of:
1. ☐ Certified copies of the priority documents have been received.
  2. ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
  3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

\* See the attached detailed Office action for a list of the certified copies not received.

#### Attachment(s)

- |  |   |
|--|---|
| 1) <input checked="" type="checkbox"/> Notice of References Cited (PTO-892)          | 4) <input type="checkbox"/> Interview Summary (PTO-413)           |
| 2) <input type="checkbox"/> Notice of Draftsperson's Patent Drawing Review (PTO-948) | Paper No(s)/Mail Date. _____                                      |
| 3) <input type="checkbox"/> Information Disclosure Statement(s) (PTO/SB/08)          | 5) <input type="checkbox"/> Notice of Informal Patent Application |
| Paper No(s)/Mail Date _____  | 6) <input type="checkbox"/> Other: _____                          |

## **DETAILED ACTION**

### ***Response to Amendment***

1. Applicant's amendment filed on July 23, 2007 has been entered. Claims 1, 10, 13, 14, 17-19, and 28 have been amended. No claims have been cancelled. No claims have been added. Claims 1-30 are still pending in this application, with claims 1, 10, 13, 17, 18, 19, and 28 being independent.

### ***Claim Rejections - 35 USC § 103***

The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negated by the manner in which the invention was made.

2. Claims 1-30 are rejected under 35 U.S.C. 103(a) as being unpatentable over Eilbacher et al (US 6,724,887), in view of Stamm (US Patent Application, Pub. No.: US 2004/0172323 A1), and further in view of Sullivan et al. (US Patent Application, Pub. No.: US 2005/0086186 A1).

3. In regards to claims 1, 17, and 19, Eilbacher discloses a method, system, and machine-readable storage for managing customer relationship management (CRM) resources (See col. 5 lines 26-30) comprising the steps of: communicatively linking a service router (See Fig. 3 and PBX/ACD 102) to a plurality of service resources (See Fig. 3 and agent work stations 104) (See col. 8 lines 31-35); for each of said service

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resources, establishing at least one routing criterion (for example, the routing criterion may be the agent's availability and/or the agent's specific skill/training) (See col. 8 lines 37-42); receiving a plurality of service requests via a plurality of communication channels (for example, customers may send in request for service via telephone calls, faxes, e-mail, etc.) (See col. 5-6 lines 66-4); analyzing said service requests for request characteristics; comparing said request characteristics to routing criteria; and automatically routing each of said service requests to a selected service resource based at least in part upon said comparing step (See col. 8 lines 37-42). Eilbacher, however, does not disclose obtaining a feedback from a feedback warehouse containing information about previous interactions from a plurality of sources including at least one of scanned documents, surveys, data mining results, external automated feedback, and internal automated feedback mechanism. Stamm, however, does disclose obtaining a feedback from a feedback warehouse (e.g., feedback information database, also See Fig. 2 and survey results database 220) containing information about previous interactions from a plurality of sources including at least one of scanned documents, surveys, data mining results, external automated feedback, and internal automated feedback mechanism (See Abstract and pg. 3, paragraph [0024] – [0025]). Therefore, it would have been obvious for one of ordinary skill in the art at the time of the invention to incorporate this feature within the method and system, as a way of receiving solicited and unsolicited feedback from customers, patrons, product users and others to help such good and services providers to improve performance, services rendering, product quality, employee training, and the like. Eilbacher, nor Stamm, however, disclose

dynamically altering values for said routing criteria based upon said feedback. Sullivan, however, does disclose dynamically altering values (e.g., weight values) for said routing criteria based upon said feedback (for example, based upon user feedback, the user is forwarded/routed to one of a plurality of information sources) (See Abstract and pg. 3, paragraph [0047]). Therefore, it would have been obvious for one of ordinary skill in the art at the time of the invention to incorporate this feature within the system and method, as a way of providing a system that controls information provided as output from the system based on learned experience gained from user feedback regarding the value of the information.

4. In regards to claims 2 and 20, Eilbacher discloses the method and machine-readable storage, wherein said communication channel of receiving step is selected from the group consisting of a telephony channel, e-mail channel, and fax channel (See col. 5-6 lines 66-4). Therefore, it would have been obvious for one of ordinary skill in the art at the time of the invention to incorporate the use of other communication channels within the method, as a way of providing communication between customers and agents.

5. In regards to claims 3 and 21, Eilbacher discloses the method and machine-readable storage, wherein said routing criteria of said establishing step is selected from the group consisting of resource availability and resource skill (See col. 8 lines 37-42).

6. In regards to claims 4 and 22, Eilbacher discloses the method and machine-readable storage, further comprising the step of: for each of said service resources, identifying at least one communication channel over which said service resource can

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respond to said service requests, wherein values for said at least one routing criterion depend upon said identified communication channel (See col. 11-12 lines 62-13 and col. 12 lines 21-26).

7. In regards to claims 5 and 23, Eilbacher and Stamm disclose all of claims 5 and 23 limitations, except the method and machine-readable storage, further comprising the step of: receiving said feedback from a plurality of sources at least a portion of which reflect past performance in handling past service requests. Sullivan, however, does disclose receiving said feedback from a plurality of sources at least a portion of which reflect past performance in handling past service requests (See Abstract and pg. 1, paragraph [0001]).

8. In regards to claims 6 and 24, Eilbacher discloses the method and machine-readable storage, further comprising the steps of: automatically extracting said feedback from a feedback instrumentality; and, assigning a feedback rating (e.g., poor, good, excellent) to said feedback (See col. 9-10 lines 50-3).

9. In regards to claims 7, 14, and 25, Eilbacher discloses all of claims 7, 14, and 25 limitations, except the method, system, and machine-readable storage, further comprising the steps of: data mining customer sales information to rate the success of a particular service request response; and responsive to said data mining step, altering at least a portion of said routing criteria for said service resource associated with said service request response. Stamm, however, does disclose data mining customer sales information to rate the success of a particular service request response (See Abstract and pg. 3, paragraph [0024] – [0025]). Sullivan, however, discloses, responsive to said

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data mining step, altering at least a portion of said routing criteria for said service resource associated with said service request response (See Abstract and pg. 3, paragraph [0047]).

10. In regards to claims 8 and 26, Eilbacher and Stamm disclose all of claims 8 and 26 limitations, except the method and machine-readable storage, further comprising the steps of: monitoring at least a portion of said service requests to obtain performance information; determining efficiency metrics from said monitoring; and, dynamically altering values for said routing criteria based upon said efficiency metrics. Sullivan, however, does disclose monitoring at least a portion of said service requests to obtain performance information; determining efficiency metrics from said monitoring; and, dynamically altering values for said routing criteria based upon said efficiency metrics (See Abstract and pg. 3, paragraph [0047]).

11. In regards to claims 9, 15, and 27, Eilbacher and Stamm disclose all claims 9, 15, and 27 limitations, except the method, system, and machine-readable storage, further comprising the step of: administratively modifying values for said routing criteria via a routing management interface. Sullivan, however, does disclose administratively modifying values for said routing criteria via a routing management interface (See Abstract and pg. 3, paragraph [0047]).

12. In regards to claims 10, 13, 18, and 28, Eilbacher discloses a method, system, and machine-readable storage for routing customer service requests within a customer relationship management (CRM) system (See col. 5 lines 26-30) comprising the steps of: receiving a service request from a customer via a communication channel (See col.

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5-6 lines 66-4); and searching a routing data store for available service resources, wherein at least a portion of said service resources represent customer service representatives (See col. 8 lines 31-38). Eilbacher, however, does not disclose for each available service resource, computing a resource preference rating based at least in part upon previous service resource interactions via said communication channel; selecting a service resource for said customer service request based upon said resource preference rating; and establishing communications via said communication channel between said customer and said selected resource. Sullivan, however, does disclose for each available service resource, computing a resource preference rating based at least in part upon previous service resource interactions via said communication channel; selecting a service resource for said customer service request based upon said resource preference rating; and establishing communications via said communication channel between said customer and said selected resource (See Abstract and pg. 3, paragraph [0047]). Eilbacher, nor Sullivan, however, disclose automatically updating service resources based upon information from a feedback warehouse containing information about previous interactions from a plurality of sources including at least one of scanned documents, surveys, data mining results, external automated feedback and internal automated feedback mechanism. Stamm, however, does disclose automatically updating service resources based upon information from a feedback warehouse (e.g., feedback information database, also See Fig. 2 and survey results database 220) containing information about previous interactions from a plurality of sources including at least one of scanned documents, surveys, data mining results,



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external automated feedback and internal automated feedback mechanism (See Abstract and pg. 3, paragraph [0024] – [0025]).

13. In regards to claims 11 and 29, Eilbacher and Stamm disclose all of claims 11 and 29 limitations, except the method and machine-readable storage, wherein said computing step further comprises the steps of: for each service resource, receiving a plurality of criteria values for routing criteria; identifying routing weights for each of said routing criteria; for each of said routing criteria, multiplying said routing weight and said criteria value; and, summing results from said multiplying to compute said resource preference rating. Sullivan, however, does disclose for each service resource, receiving a plurality of criteria values for routing criteria; identifying routing weights for each of said routing criteria; for each of said routing criteria, multiplying said routing weight and said criteria value; and, summing results from said multiplying to compute said resource preference rating (See Abstract; pg. 1, paragraph [0001]; and pg. 3, paragraph [0047]).

14. In regards to claims 12 and 30, Eilbacher and Stamm disclose all of claims 12 and 30 limitations, except the method and machine-readable storage, further comprising the steps of: receiving feedback about said service request; and, automatically altering at least one of said criteria values of an associated service resource in response to said feedback. Sullivan, however, does disclose receiving feedback about said service request; and, automatically altering at least one of said criteria values of an associated service resource in response to said feedback (See Abstract; pg. 1, paragraph [0001]; and pg. 3, paragraph [0047]).

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15. In regards to claim 16, Eilbacher discloses the system, wherein said routing management interface further comprises: business analysis tools configured to permit at least one of managers and administrators to analyze, query, summarize, and generate reports using data from said system (See col. 9-10 lines 50-3).

### ***Response to Arguments***

16. Applicant's arguments with respect to claims 1-30 have been considered but are moot in view of the new ground(s) of rejection.

### ***Conclusion***

17. The prior art made of record and not relied upon is considered pertinent to applicant's disclosure. Gisby (US 6,337,904) teaches an automated survey control routine in a call center environment.

18. Applicant's amendment necessitated the new ground(s) of rejection presented in this Office action. Accordingly, **THIS ACTION IS MADE FINAL**. See MPEP § 706.07(a). Applicant is reminded of the extension of time policy as set forth in 37 CFR 1.136(a).

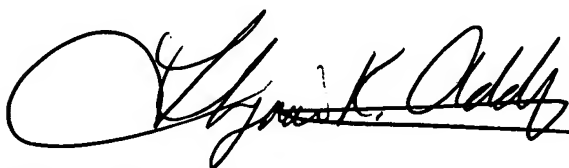
19. A shortened statutory period for reply to this final action is set to expire **THREE MONTHS** from the mailing date of this action. In the event a first reply is filed within **TWO MONTHS** of the mailing date of this final action and the advisory action is not mailed until after the end of the **THREE-MONTH** shortened statutory period, then the shortened statutory period will expire on the date the advisory action is mailed, and any

extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of the advisory action. In no event, however, will the statutory period for reply expire later than SIX MONTHS from the date of this final action.

20. Any inquiry concerning this communication or earlier communications from the examiner should be directed to Thjuan K. Addy whose telephone number is (571) 272-7486. The examiner can normally be reached on Mon-Fri 8:30-5:00pm.

21. If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Ahmad Matar can be reached on (571) 272-7488. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

22. Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

A handwritten signature in black ink, appearing to read 'Thjuan K. Addy', is written over a horizontal line.

Patent Examiner: Thjuan K. Addy  
AU 2614